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Chartered Management Institute



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Diploma in Management and Leadership

Human Resource Development  
Unit 5010



**Candidate Self-Study Guide**

1 October 2008

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## THE DIPLOMA IN MANAGEMENT AND LEADERSHIP

Welcome to The Chartered Management Institute Diploma in Management and Leadership that has been specifically designed to meet your needs whether you are a first line manager, new middle manager, thinking of working in such a role or looking to expand your management potential and business knowledge. It provides you with an excellent opportunity to network with other managers and become more effective in self-development, managing information, people, operations and resources.

Before you start work on the programme, please make sure that you read this introduction thoroughly so that you fully understand what you have to do to be successful.

This qualification was revised on 1 September 2008 and consists of the following core and optional units:

### **Core Units:**

- 5001 – Personal development as a manager and leader
- 5002 – Information based decision making
- 5003 – Performance management
- 5004 – Resource management
- 5005 – Meeting stakeholder and quality needs
- 5006 – Conducting a management project

### **Optional Units:**

- 5008 – Marketing planning
- 5009 – Project development and control
- 5010 – Human resource development

For the purpose of your Diploma in Management and Leadership, you will be studying the 5 mandatory units (plus 5006 – an integrated project) and 5008, 5009 and 5010.

Each Unit is presented to you in a separate candidate self-study guide and should be used in conjunction with the monthly workshops and personal research.

This guide contains some basic information, followed by some questions and it should take you between 10-30 hours to work your way through, depending on the topic and whether or not you attend the relevant workshop. If you make some notes against the questions and add this to your research which you will have the relevant knowledge to complete your work. The total time required will also depend on your experience and should become less as you progress through your programme.

The dates that you are required to hand in your work are clearly marked on your programme so please make sure you become familiar with them and make every effort to stick to them. Essentially, you will be required to bring one completed piece of work to each monthly workshop (unless it is the project workshop) and if you do have problems, however small, please do not hesitate to contact us.

Having completed all core units and 3 optional units to the appropriate National Occupational Standard you will be awarded the Diploma in Management and Leadership.

# HUMAN RESOURCE DEVELOPMENT

## UNIT 5010

### Unit Overview

This unit is about identifying individuals required for work objectives and providing objective development opportunities for individuals.

### Aim

The overall aims of this Unit are to help you:

- Assess how many people you need to achieve your objectives
- Ensure those individuals are properly developed, supported and monitored

### Level

5

### QCA Unit Number

Y/501/5042

### Credit Value

6

### Learning Outcomes

Each topic has a set of learning outcomes that you will be able to achieve by the time you have worked your way through this self-study guide. Attended the relevant workshop and carried out some research.

At the end of this Unit, you will have the knowledge and understanding of how to:

1. Devise a human resource plan for a work area, to meet organisational objectives
2. Identify and plan for individual development to meet organisational objectives
3. Initiate a personal development plan for an individual and evaluate progress

### Unit Contents

This Unit contains 5 parts:

Part A – Human resource planning  
Part B – Identifying and planning development  
Part C – Developing individuals  
Part D – Unit summary  
Part E – Preparing for assessment

## Skills you will need to develop to put your learning into practice

For this topic you will need the following skills:

- Setting objectives
- Evaluating
- Planning
- Reviewing
- Communicating
- Time management
- Stress management
- Obtaining feedback
- Reflecting
- Prioritising
- Leadership
- Motivating
- Mentoring
- Information Management
- Valuing and supporting others
- Balancing competing needs and interests
- Managing conflict
- Presenting information
- Problem-solving
- Assessing

## Behaviours you will need to develop to put your learning into practice

For this topic you will need to display the following behaviours:

- You address multiple demands without losing focus or energy
- You prioritise objectives and plan work to make best use of time and resources
- You take personal responsibility for making things happen
- You take pride in delivering high quality work
- You show an awareness of your own values, motivations and emotions
- You agree achievable objectives for yourself and give a consistent and reliable performance
- You recognise your own strengths and limitations, play to your strengths and use alternative strategies to minimise the impact of your limitations
- You make the best use of available resources and proactively seek new sources of support when necessary
- You reflect regularly on your own experiences and use these to inform future action
- You use communication styles that are appropriate to different people and situations
- You understand individuals' needs, feelings and motivations and take an active interest in their concerns
- You encourage and support others to make the best use of their abilities
- You use a range of leadership styles appropriate to different people and situations
- You show a clear understanding of different customers and their needs
- You treat individuals with respect and act to uphold their rights
- You show integrity, fairness and consistency in decision-making

- You comply with and ensure others comply with, legal requirements, industry regulations, organisational policies and professional codes
- You seek to understand people's needs and motivations
- You show sensitivity to internal and external politics that impact on your area of work
- You work to develop an atmosphere of professionalism and mutual support
- You recognise changes in circumstances promptly and adjust plans and activities accordingly
- You find practical ways to overcome barriers
- You present information clearly, concisely, accurately and in ways that promote understanding
- You make time available to support others
- You clearly agree what is expected of others and hold them to account
- You recognise when there are conflicts, acknowledge the feelings and views of all parties and redirect people's energy towards a common goal
- You recognise the achievements and the success of others

## INTRODUCTION

You will have already completed Unit 5001 which will have helped you recognise the need to continually develop your own knowledge, skills and abilities. It is now time to turn your attention to your team members and look at ways in which you can ensure that they have the appropriate knowledge, skills and abilities to carry out their job and achieve their objectives.

The first thing is to make sure that you have the right amount of people to carry out the work, so we shall start by looking at the way your organisation decides how many people it needs, when it needs them and what knowledge, skills and abilities these people need. According to [www.ipa-iba.com/PublishedArticles/0805.asp](http://www.ipa-iba.com/PublishedArticles/0805.asp) "recruitment is the key to a growing and successful company. Finding the right person is not always easy and you can't build a great company without great people. It takes strategic planning and an implemented recruiting system to be successful in the search for a top employee".

Next there is the importance of understanding the need to continually develop these valuable people that you have, triggered by both external and internal influences. Those organisations that are successful at development tend to share various things which we will discuss later and understand that people are individuals and learn in different ways. There are also many "barriers" that might affect the ability of people to develop to their full potential and careful attention must be given to identifying and planning development activities.

Individual team members need to have the right level of knowledge, skill and ability to carry out their role successfully. This means that everyone you are responsible for, regardless of who they are or where they are from, must be entitled to equal access to development opportunities and you must have the skills to be in a position to coach people to success through effective 1 to 1 development planning.

Each of the areas above will now be covered in detail. Make sure you fully understand each area and then have a go at your assessment, details of which can be found in the work brief for this unit.

# PART A – PLANNING HUMAN RESOURCE REQUIREMENTS

## Objectives:

- Define the term “human resource planning”
- Describe 4 key approaches to planning human resource needs
- Explain how multi-skilling and people leaving affect human resource requirements
- State some of the internal and external issues that need to be taken into account when defining human resource needs

## Introduction

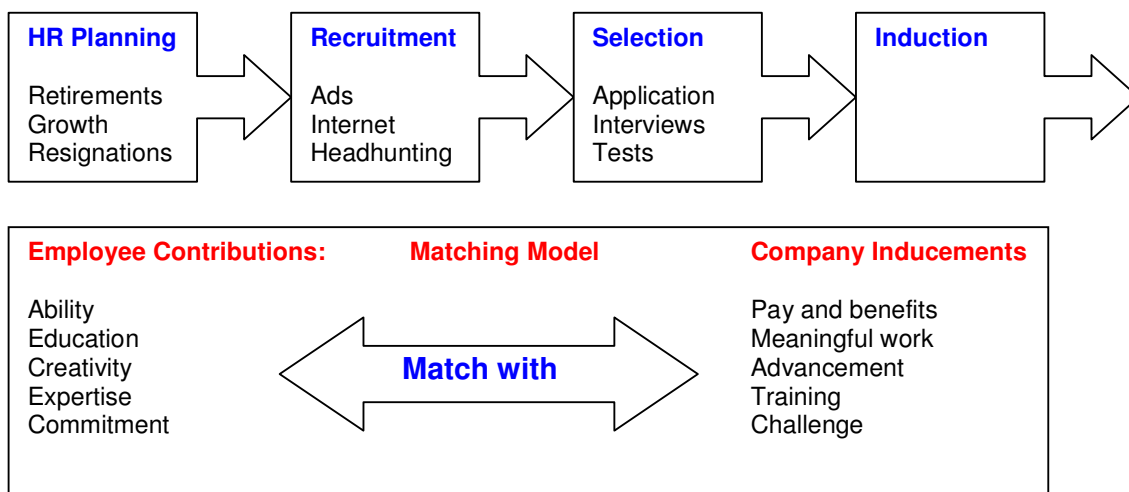
Human resource planning, according to Daft R (2000) is the forecasting of human resource needs and the projected matching of individuals with expected vacancies and starts with the following questions:

- What new technologies are emerging and how will these affect the work system?
- What is the volume of the business likely to be in the next five to ten years?
- What is the turnover rate and how much, if any, is avoidable?

With these initial questions in mind HRM specialists can now ask themselves questions like:

- How many senior managers will we need during this time period?
- What types of engineers will we need and how many?
- Are persons with adequate computer skills available for meeting our projected needs?
- How many administrative personnel, technicians, secretaries will we need to support the additional managers and engineers

Daft offers a model which is illustrated below and shows the flow of activities from HR planning, choosing recruiting methods, selecting candidates and welcoming the new employee and this will be used to guide the rest of this Unit:



There are 4 main approaches to medium and long-term human resource planning that are detailed below:

- **Managerial Judgement** – Managers who work in your organisation should have a good idea of what is required based on their experience and they may be able to forecast what is likely to happen. Unfortunately, they are only human and mistakes can occur!
- **Statistical Analysis** – is based on figures and trends. If you have completed Unit 5002 on information based decision making you will be aware that figures and trends are not necessarily an indication what may happen in the future
- **Work Study** – is about calculating how long it takes to perform tasks and then employing the appropriate amount of people. This method is gradually being disregarded by organisations as unreliable because it does not include things like wastage, absenteeism and lack of consistency
- **Productivity Measurement** – is similar to work-study in that it concentrates on the outputs from your organisation. This is then backtracked through to the number of people required to produce such outputs. Again, a reasonable method if outputs can be easily quantified and other issues are taken into consideration. The introduction of technology (which includes staff training) would have an impact on output

On what basis does your organisation determine its human resource requirements? Does it use one or a mixture of the above approaches?

Your organisation may use one or a combination of the above methods to ascertain its human resource requirements but there are some other important issues that they should take into account. For instance, changes in the way your organisation operates and trends in people leaving are important:

- **Changes in how an organisation works** – It is possible that jobs may be rotated, or shared or that multi-skilling is introduced. All 3 issues could affect the number of people you require for the future
- **People leaving an organisation** - People may leave your organisation for many reasons but trends could show things like:
  - Certain ages (e.g. 30-35)
  - Supervisors
  - Administrative staff
  - People from certain departments

If such trends occur then they should be investigated to find out the reason. For example, it may be that one particular manager is extremely unpopular for some reason and the turnover of people from that department is high.

What are the trends relating to people who leave your organisation?

There are also other factors that are important and include:

- **Internal Issues** – such as:
  - Short and long term business objectives
  - Short term operational requirements (i.e. the here and now)
  - Current and proposed technologies
- **External Issues** – such as:
  - National economic policies
  - Changes in international economy
  - Changes in the labour market

What sort of internal and external factors does your organisation take into account when planning human resource requirements?

Once these issues have been investigated, you are in a position to decide whether or not additional staff is required and obviously you need to make sure that they are the right people. The problem is that deciding “who” should be appointed is a very simple idea to grasp but a very difficult one to carry out Collins (2001).

To take this to its ultimate, David Maxwell of an American company called Fannie Mae refused to develop a strategy for the company until he had got the right people even though the company was losing \$1M per day!

## PART B – IDENTIFYING AND PLANNING DEVELOPMENT

### Objectives:

- Be aware of how external and internal factors trigger change
- Understand why team members need to continually develop to cope with change
- Identify management factors that lead to effective organisational development
- Explain the concept of individual or preferred learning styles
- Identify both organisational and individual barriers to learning
- Outline why development must be linked to organisational objectives
- Identify and measure core competencies relating to specific job roles
- Explain the importance of involving team members in the development process
- Describe how investments in people can play an important role in development

### Introduction

In Part A, we discussed the need to ensure that human resource requirements are properly planned and that you end up recruiting the right people. Now that you have those people, it is important that you both identify and help plan their development.

Let's start with a quote from Canter M (1992) found in Thomson R (1997) that provides the background for the need to develop both teams and individuals:

“In today's increasingly uncertain, competitive and fast-moving world, companies must rely more and more on individuals to come up with new ideas, to develop creative responses and push for changes before opportunities disappear or minor irritants turn into catastrophes. Innovations, whether in products, market strategies, technological processes or work practices, are designed not by machines but by people”

It is fact that organisations are rarely static and for one reason or another have to change and this is often provoked by some major outside driving force, such as cuts in funding, new market/clients and the need for dramatic changes in productivity, to name a few.

You will have come across these issues before and they are characterised by Bartol and Martin D (1998) as external and internal forces described below:

- **External** forces such as environmental issues (earthquakes and hurricanes), Government regulations, new Laws, changes in interest and exchange rates, social attitudes and new technology. This is often referred to as the Macro or General Environment. Other daily activities by people closer to you such as customers, competitors, suppliers and distributors may also affect what you do. These forces are normally found in the Micro or Task Environment
- **Internal** forces such as changes in strategy and plans, ethical difficulties arising from employee behaviour, changes in organisational culture and changes in leadership

You may be aware of the acronym PESTLE (Political, Economic, Social, Technological, Legal and Environmental), which is a tool you can use to assess the level those forces in the Macro Environment (external) which helps identify both opportunities and threats for your business.

A key point at this stage is for you to understand that change is not a simple process and it is important you realise that there is very often strong resistance to it by people. This is because they fear the unknown and are very often quite cynical about the whole idea. Indeed, many people believe that they know the right way to do things and the ideas you put forward as the manager are considered to be inappropriate. We have mentioned this so that you do not go away with the idea that change and development is easy. If only life was that easy!!! This topic will be covered in more detail later in your programme.

Think about the changes that have occurred in your organisation and others that you have worked in. What was the change? Why did it occur?

## Why is continuous development important?

Despite the difficulties involved in change, knowing why organisations change probably gives you a clue as to why continuous development is necessary – simply to keep up with those changes.

According to the Concise Oxford Dictionary, continuous means “unbroken”, “connected throughout” and “progressive” whilst development is classed as “growth”, “advancement” and “a full-grown state”. Put together they mean that we need to continually grow to meet the demands of business. Thomson R (1997) states young people in the UK value training and development opportunities over pay and perks and that 70% of a survey carried out in 1996 indicate that they would stay with a company that invested time and energy in their development.

Sometimes the development “cycle” is used to show the various stages of development it is worth looking at it now because we will be basing the rest of Unit on it:



In order for continuous development to work in an organisation, management practices have to be effective and in 1997 the Department of Trade and Industry issued a report entitled *Partnerships with People* that identified 5 such practices that provided the right environment and atmosphere for continuous development to flourish:

- **Shared Goals** – Every individual involved in the business understands exactly what the business is and everyone is working towards the same goals
- **Shared Culture** – The “way things are done around here” applies to everyone in every department
- **Shared Learning** – Learning that happens in one department is communicated to other departments so that others can benefit from what has occurred
- **Shared Effort** – Everyone puts in the same amount of effort, striving to achieve the shared goals mentioned earlier
- **Shared Information** – Having an effective communication process in an organisation that is both horizontal and vertical where everyone is provided with the information they need to perform to their best

Compare your own organisation or one that you are familiar with the 5 issues above. How do they compare?

Shared Goals –

Shared Culture –

Shared Learning –

Shared Effort –

Shared Information –

## How people learn

If you recall from your programme guide, you looked at a section on adult learning and the concept of experiential learning so there is no need to repeat it here, other than to say that there is a need to complete the cycle before learning is deemed to have taken place.

During the experiential “journey”, there are 4 phases and it is claimed that we require different skills at each phase to learn from it. These skills are often referred to as preferred or individual learning styles. Having completed your learning style questionnaire you will be aware of your own preferred or individual style but are you aware of the styles of your team members?

You will also recall the 4 styles:

- Activist
- Reflector
- Theorist
- Pragmatist

Over 70% of the people in the UK have 2 preferred styles whilst others have 3 or even all 4. You will also remember that we said that you must not pigeon-hole anyone in any particular style, however, this information can be used when selecting learning opportunities that are appropriate to the needs of your team.

What are the learning styles of your team members and have they been taken into account at all when choosing development opportunities?

Other issues concerning individual learning are:

- **Motivation** - You will be aware of the saying “you can bring a horse to water, but you cannot make it drink”. Well that applies to learning. People that you are responsible for may not be too inclined to learn. It is well known, though that people who are motivated are more likely to learn than those who are not

How motivated are the people you work with towards learning and improving themselves? If they are not, what are their reasons? What sort of example do you set them?

- **Organisational Barriers** - As we have already discussed, organisations have to change whether they like it or not and teams and individuals must develop continuously. Some organisations though have built-in barriers that make it difficult for it to focus on learning and development some of which are discussed below:
  - An organisation that has got itself in a position where it is constantly “fire fighting” and chasing its own tail. This may be caused by lack of staff, too much work or bad planning and the majority of the time is spent trying to satisfying customer requirements. Whatever the cause, it does not have the time to sit back and reflect on what it can do to stop this situation
  - Some organisations have managers who are frightened that other people may pose a threat to them and their position. This results in training and development being deliberately stopped or limited. A classical example of this was discussed on the TV on 4 November 2005 where a Greek man enquired about promotion and within a week was made redundant! He was replaced by someone else so he took his case to a Tribunal and won
  - Other organisations become obsessed with processes and opposed to people, examples of which are ISO 9000:2000
  - Often the story is heard about organisations who refuse to train and develop people because they fear that after they complete the learning they up and leave

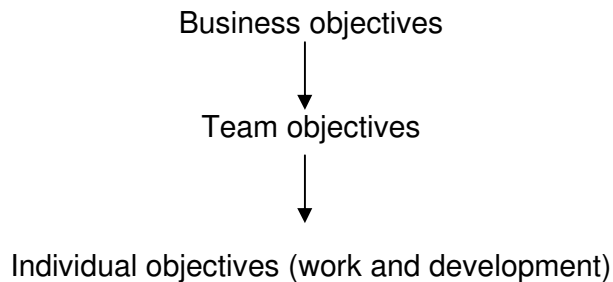
Describe below the barriers to learning that exist in your organisation at the moment?

- **Individual Barriers** - Some of the issues relating to individual barriers are in your programme induction booklet and include some tips on how to overcome them. You will recall during your induction that you were asked about any fears you may have and listed below are some of your responses:
  - It has been years since I have studied!
  - What happens if I get behind with my work?
  - What happens if I miss a workshop?
  - I might not be as good as the rest of the people
  - I don't know how to write a management report!
  - I hope I am good enough for this programme

By understanding both organisational and individual barriers to learning, you can help people overcome them through by-passing them or sharing your experience on how to overcome them.

## Identifying development needs

Now we can go back to our development model and start by identifying development needs. In other units you will recall we discussed the following process:



How does your organisation decide on who needs developing in what? Do you agree work and development objectives with your team members and if you do, what is the process for doing this?

Another way in which you can keep an eye on development needs is to use a “versatility” chart which is very simple and easy to use. A typical versatility chart can be found at <http://www.ali.gov.uk/NR/rdonlyres/9A40E530-BC9C-41FB-B542-3156C9A5D51C/0/VersatilityChart.pdf>

Another way of keeping an eye on things is to use “diff-rating” scale which is about identifying tasks that your team members need to carry out and then allocating ratings to them based on:

- Frequency
- Importance
- Difficulty in learning

You can allocate whatever rating you feel is appropriate but might consider:

| Importance           | Frequency           | Difficulty          |
|----------------------|---------------------|---------------------|
| 1 = critical         | 1 = all of the time | 1 = Complex         |
| 2 = important        | 2 = often           | 2 = Quite difficult |
| 3 = minor importance | 3 = sometimes       | 3 = Reasonable      |
| 4 = not important    | 4 = rare            | 4 = Easy            |

What process do you currently use to keep an eye on development needs at the moment?

### Identifying and measuring competences

We are now going to look at identifying the skills and knowledge of others in order that we can identify the gaps. Once the gaps have been identified, we can use the knowledge of how we learn and individual learning styles to select the appropriate learning opportunity. Some organisations like to identify what they call competences which are “a simultaneous integration of the knowledge, skills, attitudes required for performance in a designated role and setting.” Dorothy del Bueno, 1978 and “map” these against job roles.

Sometimes competences are divided between core competencies which refer to an essential and required knowledge, skill, attitude required for performance within a given practice and optional or secondary competencies.

It is then possible to prioritise those competences and ensure people are trained in them. These competences are normally based around the achievement of both team and individual objectives and some examples are:

- Communication
- Managing performance
- Working in a team
- Handling changes

Often these competences are identified at formal reviews such as appraisals on an annual or 6-monthly basis. This is, of course, not enough. In fact, there is nothing wrong with encouraging your team members to contribute to the identification of their own development needs and this could be updated on a more regular basis.

Some examples of competency matrices can be found at:

- <http://www.icas.sk.ca/competencymatrix.htm>
- <http://allpm.com/modules.php?op=modload&name=News&file=article&sid=1122>
- <http://yhcoe.rcoe.gov.uk/rce/aio/15026>
- <http://personalweb.smcvt.edu/mscoville/staff%20comp.htm>

Does your organisation have a competency system? If so, how does it work? What core competencies do your team members need and do they have them?

### Involving team members in the process

There is no reason why you cannot involve your team members in the process of identifying their own development needs. Perhaps they could draw up a versatility chart or allocating diff-ratings to the work they do? If team members are involved in the process, they are more likely to “own” the development rather than just treat it as another training session.

To what degree are your team members involved in both identifying and planning their own development?

## Investors in people

One way of introducing a planned, organisational approach to development is to consider the Government's "Investor in People" award (IIP). This will ensure that:

- Senior people in your organisation are committed to developing its staff
- Regular reviews are carried of staff development needs
- Development starts with an effective induction programme, ensures staff are made aware of development opportunities and that managers provide support
- Regular evaluation of training takes place

You can find more details in IIP at <http://www.investorsinpeople.co.uk/IIP/Web/default.htm>

Does your organisation have the IIP award? If so, is it ensuring that people are developed to their full potential?

## PART C – DEVELOPING INDIVIDUALS

### Objectives:

- Ensure that all your team members have equal opportunities access to development
- Describe some of the “unwritten rules” that affect development opportunities
- Develop a coaching approach to helping individuals develop
- Devise, monitor and review a development plan for a member of your team
- Ensuring that development of individuals is recorded and kept confidential

### Introduction

It goes without saying that people are your greatest asset, so it seems very logical that you should ensure they are developed to their full potential. Individuals cannot do it alone, though and will require your assistance on a one-to-one basis. Your team will also have objectives that it needs to achieve and it might not have the knowledge, skills or abilities to do just that. Again, you might have to both devise and carry out training that will help them.

One thing for sure is that you must under all circumstances ensure that you provide equal and fair access to develop to all your staff, so let's start there.

### Equal opportunities in development

Before we discuss the actual process of developing your teams and individuals within teams, it is imperative that you are aware that whatever applies to one person, must apply to another. This is called equal opportunities and applies to development as it does to other topics.

You will recall our discussion on equal opportunities when you started your Diploma programme. Well development is the same – you must not discriminate against anyone because of age, sex, gender, colour, racial origin, social or cultural background, ethnicity or disability. What you actually should be doing is actively promoting the values of equal opportunity so that all your team members feel they are being treated fairly and have the same opportunities to develop.

As a manager who will receive a Diploma in Management, we also suggest that you should challenge any issues of equal opportunity whether it is towards development or in general.

Another issue regarding equal opportunities which some managers unconsciously think about is stereotyping. Just because someone might have a disability does not mean that they would not want to go on a certain course and it is up to you to make sure they have the same opportunity as anyone else. If that means changing the programme in some way, then that is what you must do.

## Unwritten Rules

From a development point of view, there are some “unwritten rules” that seem to be prevalent in some large organisations *Sims D et al (1992)* and often apply to people trying to further their career, so they are also worth knowing about:

- **It's not what you know, but who you know** – You may find not so talented people gaining promotion because they know the right people and others being held back because they have upset someone who has considerable influence
- **You have got to make a big splash to be noticed** – some jobs are simply not visible to the right people, however, people involved in high visibility jobs often tend to “stand out” and are more likely to be rewarded
- **You need to move fast early on to get to the top** – In some professions if you have not made the top by the time you are 35 you are deemed to have missed the boat! Sometimes people over 40 find promotion passing them by.

It is still quite rare in the UK for women and people from ethnic backgrounds to reach top management positions and this is often referred to as the “glass ceiling” effect, which is basically a set of invisible barriers that affect careers of minority groups, particularly women. Again during the TV programmes on 4 November 2005 one person said that the glass ceiling was in fact made of concrete! For an interesting read, try:

[www.sses.com/public/events/euram/complete\\_tracks/gender\\_issues/holley\\_simpson.pdf](http://www.sses.com/public/events/euram/complete_tracks/gender_issues/holley_simpson.pdf)

Another issue that you may well have read about recently is ageism. As an “ism”, ageism reflects a prejudice in society against older adults. There is the saying that the older you get the better you get – interesting then that these days if you are over 30 you are considered to be past it!

New laws outlawing ageism in the workplace have recently come into force with the aim of producing an “age-neutral” employment market, where employers cannot specify that a new recruit should be above or below a particular age. For example, it will mean the end of job advertisements calling for “young, enthusiastic recruits”.

A recent survey by the Employers Forum on Age found that 61% of British employees say ageist behaviour goes on in their workplace. But the forum has also estimated that around half of them do not know about the new legislation and how it can protect them.

However, there is a get-out clause for employers - the law does not apply to workers who are over the statutory retirement age of 65. Whether or not compulsory retirement will be kept at that age or abolished altogether will be formally reviewed by the Government in 2011.

## Coaching people to success

Coaching is a learning opportunity that is especially effective where an individual or learner has potential that can best be developed through a focused individual relationship with a more experienced and senior colleague. It is basically on-the-job training and the providing of feedback on performance and it is normally used for a small-scale development need. This activity can be time-consuming and may take you away from your own work but detailed below are of some of the skills that you would need as an effective coach.

When used selectively and appropriately, coaching is:

- A cost-effective approach to development that is targeted at an individual and their personal needs
- Designed to develop the skills of an existing employee rather than having to recruit extra or substitute staff
- A positive message to staff that the organisation values them
- Helps the learner apply knowledge gained from a formal course to the actual job they are doing

Again, coaching has its drawbacks, some of which are:

- It can be drain on resources because it is about one-to-one relationships
- If it is not structured it can be confused with work shadowing
- The learner may not be committed to a one-to-one approach

A good coach would:

- Identify the learning need by:
  - Talking to the individual about their job and development needs
  - Observing the individual at work and identify areas that could be improved
  - Establishing an individual's strengths and weaknesses
- Plan and prepare by:
  - Identifying and agreeing the standards required
  - Planning how the individual may improve and reach the required standards
  - Helping prepare a personal development plan and ensuring it is clearly linked to organisational objectives
  - Finding out what an individuals preferred learning style is
  - Preparing a coaching plan

- Carry out the coaching by:
  - Conducting coaching sessions at work through observation, listening, questioning and giving feedback on performance
  - Linking the sessions with the preferred learning style
  - Regularly revising the situation
  - Ensuring that the individual has the resources and time required
  
- Evaluate the success by:
  - Asking the individual for feedback on progress
  - Assessing the progress against the agreed standards
  - Assessing any improvements made
  - Assessing whether the coaching was worthwhile from a cost and time point of view
  - Assessing lessons learnt for next time

Another model you might consider is GROW and this can be found at [http://www.mindtools.com/pages/article/newLDR\\_89.htm](http://www.mindtools.com/pages/article/newLDR_89.htm)

### Other coaching opportunities

Other coaching opportunities that might be available to you are:

- Getting team members to work with another person who is experienced and who adopts the sort of attitude that you would like copied
- Discussing development issues with your team as a whole unit with you facilitating the session
- Using role-play (provided the team member is in agreement as most people, despite their preferred learning style, do not like this type of learning opportunity)
- Asking team members to research a topic and produce a briefing or presentation

Have you coached someone before? How did it go? What was the process you followed compared to that suggested above?

## Preparing development plans

When preparing to coach someone, it is important to have a plan that both of you can work with. A typical plan might include the:

- Name and job title of the person being coached
- Area that needs improvement
- Agreed target or goal
- Agreed method of coaching
- End date for completion
- Type of support required (including other people)
- Method and dates of reviews
- Way in which the development will be evaluated

## Confidentiality

Regardless of what approach you use, it is important that you keep confidential records on each individual concerning their development. These records are also affected by the Data Protection Act and must be available to individuals if they request it.

What confidential training records does your organisation keep?

## PART D – UNIT SUMMARY

Well, that's it! We hope that you have now developed your knowledge, understanding and skills are now in a position to try out what you have learnt to enhance your contribution to human resource planning and the development of both your team members and your team.

Just a quick reminder of what we have covered and what you should now be aware of the:

- National Standards in Management relating to Human Resource Development (Unit 5010)
- Need to carefully plan human resource requirements
- Importance of effective identification and planning of development
- Process involved in developing teams and individuals
- Necessity to ensure equal opportunities of access to development opportunities

## PART E - PREPARING FOR ASSESSMENT

By the time you have completed this self study guide, you will also have attended the relevant monthly workshop. Now you need to carry out some extra research and gather some more information on these topics which you can use for your assessment.

You can submit a draft of your assessment to the Centre and we will give you some form of feedback as quickly as possible to enable you to complete your final piece of work.

You will find all the resources you need by going to [www.kdtraining.co.uk](http://www.kdtraining.co.uk), then clicking on "Access to Candidate Area", then clicking on "Diploma in Management and Leadership"

You already have a hand-in date for your work and you should try to stick to this. Don't forget you need to hand in:

- Your completed report
- Your completing marking sheet
- A copy of your work brief

Once your work has been received it will be marked. If, for any reason, you have not reached the standard in any particular area of your work, you will be offered guidance and will be allowed to resubmit that particular piece. Your work may be internally moderated and will be passed to the CMI for final approval.

Please make double sure you keep a copy of your work because it will not be returned to you.

At the end of your programme, all of your work will be presented to the CMI External Verifier and a final decision will be made regarding your qualification.

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